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ABSTRACT

The purpose of this module is to help the professional school counselor acquire and demonstrate a number of specific competencies in the area of information processing. Included are 33 indicators, or statements describing skills, in the general areas of referral, pupil appraisal, and resource management. This document is one of seven staff development programs which target performance skills of school counselors. The programs include the competency areas of: planning, individual counseling, group facilitation, in-service training, consultation, information processing, and legal/ethical concerns. (Author/LEB)

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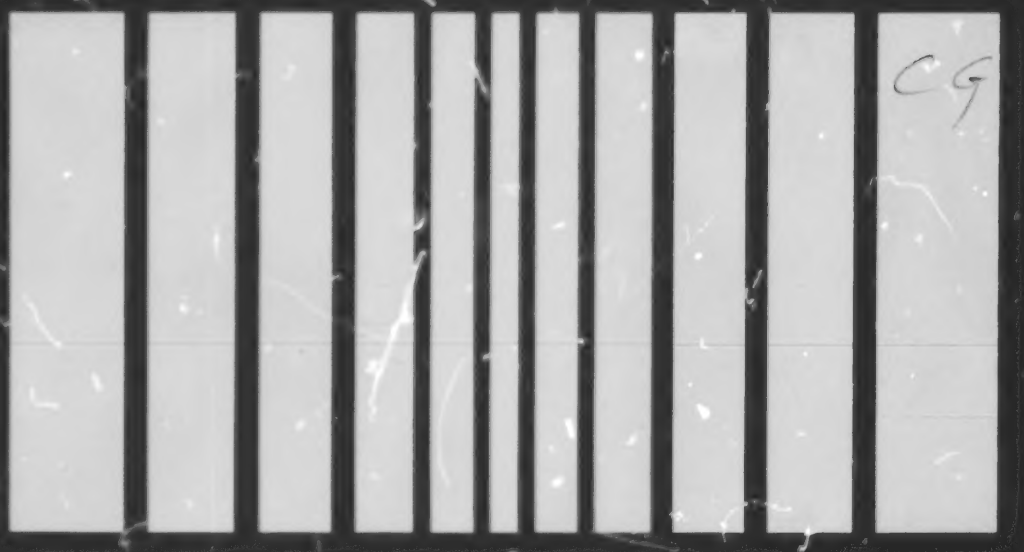
PIONEER CESA

STAFF DEVELOPMENT PROGRAM for SCHOOL COUNSELORS



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PIONEER CESA GUIDANCE PROJECT

A STAFF DEVELOPMENT PROGRAM

FOR

SCHOOL COUNSELORS

INFORMATION PROCESSING

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PIONEER CESA GUIDANCE PROJECT

A STAFF DEVELOPMENT PROGRAM

FOR

SCHOOL COUNSELORS

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Preface

This document is one of seven staff development programs which target performance skills of school counselors. The programs include the competency areas of: Planning, Individual Counseling, Group Facilitation, In-Service Training, Consultation, Information Processing and Legal/ Ethical concerns. While there may be other areas which will be helpful to school counselors, the skills described in this series are felt to be essential.

The staff development programs are one component of a comprehensive student needs based guidance system developed by the Pioneer CESA Guidance Project. The competencies which are addressed in these modules were derived from identified student goals related to guidance. The attainment of the skills described in the programs should facilitate counselors' clients in achieving these goals.

The staff development programs are designed to be used by students who aspire to become school counselors, by entry level counselors who are seeking to demonstrate their skill for certification purposes, and by experienced counselors who wish to enhance their skills. An individual may use the programs in an informal setting or they

may be used in a more structured group of counselors pursuing a formal staff development plan.

The emphasis of each program is on performance; thus an effort has been made to avoid another textbook in the specified area. A format has been developed which uses behavioral indicators as the focus for activities. A basic knowledge of the area of functioning is assumed. Where this prerequisite knowledge is not present, selected readings and references are provided.

Upon completing each of the programs the participant should be able to successfully demonstrate the skills needed to be certified as competent in the performance area. Further, it is the hope of the project staff that the skills acquired through this series of programs will facilitate positive growth in the knowledge, skills and attitudes of the young people with whom school counselors have contact.

William B. Ware
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RATIONALE

Most counselor training programs do not have access to real-life environments where counselors work and live, which means that skills related to the processing of information about medical referrals, community resources, jobs, schools, drugs, and other areas are not really developed or appreciated until the new counselor gets on the job. The role of the counselor as a "system intervener," the professional who helps students link the worlds of education and work, schools and parents, schools and schools, or general and specialized mental health services, is of critical importance in the successful performance of the guidance function. Information processing, then, refers to the skills which counselors develop and use to enable them to serve as linkage persons who facilitate transitions between school and work, school and community, and other areas.

The purpose of this module is to help the professional school counselor acquire and demonstrate a number of specific competencies in the area of information processing. Because many counselors do not have a good background in systems approaches, it might be helpful to read Blocher, et al.(1971); Reardon and Burck (1975); Shaw (1974); Ryan, et al. (1972); Morrill, et al. (1974). These sources

will help provide a more complete rationale for the specific learning exercises included in this module. Finally, the completion of module exercises will allow you to both draw upon and build upon some of the duties comprising your current job description. For example, if you already have a good statement of referral policy for your office, you are well on your way; if you do not, you will need to develop such a statement to complete this module.

This module is lengthy, with many specific skills to demonstrate. Included are thirty-three (33) indicators, or statements describing or indicating skills in the general areas of referral, pupil appraisal, and resource management. Eighteen (18) of the 33 indicators involve the performance of a task which will result in a written product to be included in an Information File. (The Information File will be used in your certification review.) The other 15 indicators also involve active performance in your role as counselor, and your skills on those 15 "process" indicators will be reviewed by an outside evaluator.

Within the three major areas of (1) referral, (2) pupil appraisal, and (3) resource management there are numbers of specific skills and clusters of skills

which combine to demonstrate competence in the area. For example, in the area of referral skills there are a series of specific skills (indicators) that work together in identifying exceptionalities for referral. For the purpose of promoting the development and interdependence of these related skills, they are being presented as clusters. Therefore, two major organizational steps have been taken to facilitate the successful completion of this module: (1) the organization of information processing skills into the three major areas of referral, pupil appraisal, and resource management and (2) the organization of related skills within these areas into clusters. This organization is presented in the following outline. Note that the 18 indicators related to written products for the Information File are marked with an asterisk (*) and are distinguished from the 15 process indicators. The 15 process indicators will be integrated with the Learning Exercises of the module designed to enable you to produce the 18 products for the Information File.

Referral Skills

Cluster I. Services/agencies for referral.

*I.1 Prepares a referral file which lists medical, mental health, social, volunteer, religious, youth and government services or agencies.

Cluster II. Referral policies, procedures, & criteria

*I.2 Prepares a written statement of referral policies and procedures.

*I.3 Prepares a written statement of referral criteria used by the counselor.

Cluster III. Symptoms, characteristics, definitions, and criteria used to identify exceptionalities.

*I.4 Prepares a written statement of symptoms and characteristics used to identify handicaps including speech, hearing, visual, crippling, special health.

*I.5 Prepares a written statement of definitions and criteria used to identify exceptionalities including creativity, intellectually gifted, withdrawn, socially maladjusted, aggressive, underachieving, slow learning, retarded.

I.6 Informs staff, students, parents about referral policies, procedures and programs.

I.7 Consults available resource persons and files prior to making a referral.

I.8 Respects parent (or of-age student) wishes regarding referrals.

I.9 Remains in contact with agencies receiving referrals.

I.10 Remains in contact with students who have been referred and referral source.

I.11 Records and keeps current a list of all outgoing referrals.

I.12 Visits referral agencies.

Appraisal Skills

Cluster IV. Tests/non-tests, and school/non-school sources of appraisal.

*I.13 Prepares a list of achievement, aptitude, intelligence, interest tests available to the counselor.

*I.14 Prepares a list of non-test devices to conduct student appraisal which may include observation guides, interview guides, student autobiographies, self-report scales, etc.

I.15 Prepares a list of sources of student appraisal within and outside the school system.

I.16 Observes and objectively reports on student behavior.

I.17 Selects, schedules, administers, interprets and scores tests.

I.18 Keeps student test files current and complete.

Resource Management Skills

Cluster V. Occupational exploration materials.

*I.19 Prepares a list of occupational exploration materials available to students and teachers.

Cluster VI. Survey of local job market.

*I.20 Prepares a survey of the local job market.

Cluster VII. Community resource people for career exploration.

*I.21 Prepares a list of community persons available for career exploration programs.

Cluster VIII. Educational opportunities at post-secondary level for high school students.

and extra-curricular opportunities for elementary or junior high students.

*I.22 Prepares a list of post-secondary educational opportunities materials including 2 and 4 year colleges, vocational programs, military options and available sources of financial assistance (elementary and junior high: extra-curricular educational opportunities).

Cluster IX. Information resource materials on drug use, family planning, multiethnic groups, and interpersonal relations.

*I.23 Prepares drug use information.

*I.24 Prepares family planning information (or sex education materials).

*I.25 Prepares multiethnic education materials.

*I.26 Prepares interpersonal relations materials.

Cluster X. Confidential emergency medical file.

*I.27 Prepares a confidential emergency medical file of students.

Cluster XI. Parent information package.

*I.28 Prepares a parent information package including information on school hours, holidays, lunch, visitations, emergencies, special services, etc.

I.29 Keeps all resource files current.

I.30 Selects materials appropriate for the grade level served.

I.31 Makes resources accessible to users.

I.32 Updates files regularly.

I.33 Contributes to guidance publications and/or local media presentations.

INSTRUCTIONS FOR COMPLETING THIS MODULE

As you have observed, there are 33 specific skills included in this module. These skills are also called indicators because they indicate or show counselor competencies which are essential for adequate professional functioning. You will also observe that the 33 indicators have been grouped into 11 clusters of interrelated skills. The 18 "product" indicators relate to written products which will be placed in an Information File, which will in time be used as a major source of data in your certification review. The remaining 15 indicators relate to procedures or skills which you must master, but these "process" indicators will not lead directly to a written product for the Information File.

Each of the 18 product indicators can be achieved, assuming you have not already produced the necessary written material by completing the Exercises under each Cluster. The primary exercises are required because they will either lead to producing the written product indicator, or because they are a required process indicator. Alternative exercises are optional, but should be useful in further polishing your skills. In general, the exercises will require you to read, listen, write, visit, confer, observe, talk, explore or review.

The Self-Check on the following page will help you determine your present level of skills in information processing. After you have completed and scored the Self-Check, you are ready to move to the clusters and related exercises. When you finish the module, you will have further developed and demonstrated your skills in information processing.

SELF-CHECK

Directions: Read each statement carefully, and then mark either Yes, No, or Unsure, depending on the relevance of the statement for you.

Y U N 1. Do you have access to a current referral file listing medical, mental health, social, etc. services/agencies?

Y U N 2. Have you recently prepared a statement of referral policies/procedures?

Y U N 3. Have you ever written a statement to be used in identifying students with speech, hearing, visual, etc. exceptionalities?

Y U N 4. Have you recently held a meeting for staff and/or parents on referral matters?

Y U N 5. Have you recently visited referral agencies to consult with resource persons?

Y U N 6. Do you maintain current referral records?

Y U N 7. Do you have access to a list of all psychological tests available for your use?

Y U N 8. Do you have access to a current list of all

school and non-school sources of pupil appraisal?

Y U N 9. Do you currently select, schedule, administer, interpret and score tests for students in your school?

Y U N 10. Do you regularly observe and objectively report on student behavior?

Y U N 11. Do you keep test files current and complete?

Y U N 12. Do you have access to a list of non-test instruments, e.g. self-report scales, observation guides, etc., for use in your work?

Y U N 13. Do you have access to an up-to-date list of career information materials available to students and teachers?

Y U N 14. Have you recently conducted a survey of the local job market?

Y U N 15. Do you and other staff have easy access to drug use and family planning information?

Y U N 16. Have you prepared a parent information package, including referral information, schedules, services, etc?

Y U N 17. Do you have access to a current list of community resource persons available for career exploration?

Y U N 18. Do you have access to a list of post-secondary educational/training opportunities (extra curricular opportunities for elementary and junior high students)?

INTERPRETATION OF SELF-CHECK

Items 1 - 6, Referral Skills

If you answered No or Unsure to one or more items, go to page 10 and begin completing instructional

activities to improve your referral skills. If you answered Yes to those items, congratulations on your competencies; you're well on your way to certification.

Items 7 - 12, Pupil Appraisal Skills

If you answered No or Unsure to one or more items, go to page 25 and begin completing instructional activities to improve your appraisal skills. If you answered Yes to these items, congratulations on your skills and competencies; you're well on your way to certification.

Items 13 - 18, Resource Management Skills

If you answered No or Unsure to one or more items, go to page 31 and begin completing instructional activities to improve your resource management skills. If you answered Yes to these items, congratulations on your competencies; you're well on your way to certification.

REFERRAL SKILLS

Making proper, effective referrals is a counselor skill of critical importance. The background work for an effective referral is extensive, and includes a thorough knowledge of community resources, established interpersonal relationships, written policy statements, including referral criteria. The 12 indicators related

to referral skills have been grouped into 3 clusters. Cluster I involves preparation of a referral file; Cluster II involves development of policy, procedure, and criteria statements; and Cluster III involves the identification and referral of students with exceptionalities.

Cluster I: Services/Agencies for Referral

This cluster includes one goal, which is a required product indicator. Consequently, the exercises identified below will lead to the production of a written product for your Information File. There are a variety of primary and alternative exercises which will provide you with a variety of learning options. Taken together, they will enable you to document your skills in the development of referral sources. The Self-Assessment will help you keep a record of your work on this cluster.

> OBJECTIVE: Upon completion of the instructional activities in this cluster, you will have prepared a referral file which lists (1) medical, (2) mental health, (3) social, (4) volunteer, (5) religious, (6) youth, (7) government and (8) employment (high school counselors only) services or agencies.

Directions: Below are several instructional activities designed to enable you to meet the objective stated above. Some of the activities are optional, but some are required because they are also identified as process indicators required for certification.

Alternative Exercises

Exercise 1. Read the script or listen to the audiotape on "The Referral Process."
(Appendix D, page 97)

Exercise 2. Read Chapter 15, "Referral Procedures & Community Guidance Resources" (pp.407-425) in Fundamentals of Guidance, 3rd Edition, by Shertzer and Stone.

Primary Exercises

Exercise 3. Set up a 3 x 5 card file (or some other filing system) with the 7 or 8 categories listed above in the module objective with each referral service agency having a separate card entry. This file should contain 95% of the agencies in your community. One possible format for this card file is shown below.

EXAMPLE

Sample Referral File Cards

This desk top card Referral File is simple to use and maintain. Materials include a set of 50 - 100 3x5 cards and a box to hold them in. Seven or eight tab cards for each of the major referral categories will also be useful.

The tab card (or first card in each category) should name the category (and possibly each service/agency included therein).

Entry cards should include the following information (next page). Note that there is a space for recording both the creation or update of the card, and for the time of the last visit to the agency.

Agency:_____ Phone:_____

Address:_____

Contact Person(s):_____

Description of Services (costs, intakes, reports, etc.):_____

_____

_____

_____

Created/Updated:_____Visited:_____

On the back of each card, or on separate cards, you should create a system for recording each referral, the date of the referral, and the dates of follow-up contacts with the student and/or parents and the referral contact in the agency. The outcome of the referral, especially as it effects continued referral procedures or policies, should be briefly noted on the card.

Name:_____Date:_____

Parent consulted:_____

Follow-up contacts: Referred:____Contact:____

Outcome:_____

_____

_____

_____

Exercise 4. Set-up a check-off system for each referral, which includes a follow-up contact with both the students referred and the referral source.

Exercise 5. Call the referral source before making a referral to check on criteria for referral, intake procedures, forms, time and date of referral contact, and specific name of referral contact. Modify your referral file information when new data is obtained.

Exercise 6. Visit referral agencies on a regular, planned schedule of one per month, and maintain contacts between visits. Update your referral file as you obtain new information from these visits or contacts.

SELF-ASSESSMENT

In order to help you assess your readiness to move on to the next Cluster on activities related to Referral Skills, write in the date for each item in the Self-Assessment chart below:

Activity	Date Completed
1. Read the script or listen to the tape on "The Referral Process". (optional activity)	1.
2. Read Chapter 15 in Shertzer and Stone, Fundamentals of Guidance.	2.
3. Set up a referral file with 7 or 8 categories including 95% of referral contacts.	3.
4. Set up a procedure for recording and following-up on each referral made.	4.
5. Practice good referral procedures, including calling beforehand, etc.	5.

Activity	Date Completed
6. Visited or personally contacted each agency/service on your referral list.	6.

If you have completed items 3,4,5,6 and recorded a date for each, you are free to move to Cluster II, Referral Policies, Procedure and Criteria.

Cluster II: Referral Policies, Procedures and Criteria

This cluster includes two product indicators, which means you will develop two written products for the Information File. Skills related to this cluster are especially important for contemporary counselors because of the important issues concerning ethical and legal rights to privacy. The readings included in the Alternative Exercise are strongly recommended. The Self-Assessment will help you record your work on this cluster.

Objective: Upon completion of the instructional activities in this cluster, you will have produced (1) a written statement of referral policies and procedures, and (2) a written statement of referral criteria used by the counselor.

EXERCISES

Directions: To meet the objective of this cluster you prepare two written documents. The learning activities identified below are designed to enable you to prepare these two documents.

Alternative Exercise

Exercise 1. Read the following references:

Russell Sage Foundation, Guidelines for collection, maintenance, and dissemination of pupil records. New York: The Foundation, 1970

The Family Educational Rights and Privacy Act of 1974, usually called the Buckley Amendment (Appendix A, page 62).

APGA, Ethical Standards. Washington, DC: The Association, 1974.

Heayn, M. & Jacobs, H. Safeguarding student records. Personnel & Guidance Journal, 1967, 46, 63-67.

Primary Exercises

Exercise 2. Read the script or listen to the audiotape on "The Referral Process" by the author, (Appendix D, page 97).

Exercise 3. Prepare a draft statement, approximately 500 words or more, which includes the following four sections indicated by subheading: (1) outline of referral processes for teachers, parents and students, (2) policy on parental and/or student consent, (3) procedures and forms used for referral, and (4) follow-up procedures for students referred.

Exercise 4. Circulate the draft statement (described in Activity 3) and solicit comments and reactions from staff, students, and parents. Advisory committees, student councils, the school attorney, the school administrators, and professionals in the community might also be asked to react to the proposed statement. After obtaining input from these various groups and clarifying points of confusion or conflict, draw-up the final draft of the statement.

Exercise 5. Prepare a statement of referral criteria, including the two sections identified by subheadings: (1) guidelines for making a referral and (2) guidelines for accepting referrals from other sources. This

statement should be consistent with the statement on policies and procedures, and based on principles included in the readings identified in the Alternative Exercise.

SELF-ASSESSMENT

In order to help you assess your readiness to move on to the next cluster of activities related to referral skills, record the date for each item in the self-check below:

Activity	Date Completed
1. Read the script or listen to the audio-tape on the "Referral Process". (optional)	1.
2. Read the identified references. (optional)	2.
3. Prepare a draft statement on referral policies and procedures.	3.
4. Circulate the draft among parents, students, staff, and draw up a final statement using suggestions for refinement.	4.

Activity	Date Completed
5. Prepare a statement of referral criteria.	5.

If you have completed items 3, 4, and 5 and recorded the date for each, you are free to move to Cluster III regarding exceptionalities.

Cluster III: Symptoms, characteristics, definitions and criteria used to identify exceptionalities.

This cluster includes two product related indicators, which may be placed in your Information File. In addition, several process indicators are included in the Exercises which are described below. The skills included in this cluster have become increasingly important for counselors in recent years, especially as laws have been passed which require counselor functioning regarding student exceptionalities. Completion of exercises in this cluster will enable you to document your skills regarding exceptionalities. The Self-Assessment will help you maintain a record of your work.

OBJECTIVE: Upon completion of instructional activities in this cluster, you will have produced (A) a written statement of symptoms and characteristics used to identify exceptionalities including (1) speech, (2) hearing, (3) visual, (4) crippling and (5) special health; and (B) a written statement of definitions and criteria used to identify exceptionalities including (1) creativity, (2) intellectually gifted, (3) withdrawn, (4) socially maladjusted, (5) aggressive, (6) underachieving, (7) slow learning, and (8) retarded.

EXERCISES

Directions: To meet the objectives of this cluster you must prepare two written documents. The learning activities identified below are designed to enable you to prepare these documents.

Alternative Exercises

Exercise 1. Read and study pages 23-38 of the Regulations and Procedures: Special Education Program produced by the Georgia Department of Education, 1976. This statement defines and sets criteria for most of the exceptionalities which must be addressed in meeting the above objectives. (Appendix B, p 72)

Exercise 2. Read and study appropriate selections from two basic texts: (1) Kirk, S.A. Educating Exceptional Children. Boston: Houghton-Mifflin, 1972. (2) Cruickshank, W.M. and Johnson, G.O. (Eds.) Education of Exceptional Children and Youth. Englewood Cliffs, NJ: Prentice-Hall, 1975.

Primary Exercises

Exercise 3. Draft a paper titled "Statement of Symptoms and Characteristics used to Identify Handicaps," making sure that the five categories identified in (A) under "objective" are included. Ask a special education teacher and other professional specialists in your community who have expertise with your age level clients to critique your paper. Write a final document based on this feedback. (Feedback might include other student characteristics typically associated with various handicaps, behavioral symptoms associated with various exceptionalities, etc.)

Exercise 4. Draft a paper entitled "Statement of Definitions and Criteria Used to Identify Exceptionalities," making sure that the eight categories identified under (B) in "objective" are included. Ask other professionals,

including a special education teacher, school psychologist, rehabilitation counselors, and other professional specialists in your community, who have expertise with your age level clients, to critique your paper. Prepare the final document based on this feedback from experts on exceptionalities.

SELF-ASSESSMENT

In order to help you assess your readiness to move on to the next cluster of activities related to assessment skills, record the date for each in the self-check below:

Activity	Date Completed
1. Read Appendix B- Regulations and Procedures--Special Education Programs.	1.
2. Read appropriate pages in the texts.	2.
3. Prepare paper on "Symptoms and characteristics used to identify handicaps."	3.

Activity	Date Completed
4. Prepare paper on "Definitions and criteria used to identify exceptionalities."	4.

When you have completed items 3 and 4 and recorded a date for each, you are ready to move to Cluster IV.

PUPIL APPRAISAL SKILLS

Cluster IV: Test/Nontest and School/Nonschool Sources of Appraisal

This cluster on Appraisal Skills includes three product indicators to be included in your Information File and three process indicators. All six indicators relate to required skills. Counselors have long been identified as the members of the school professional staff with special skills and expertise in the use of tests, observation check lists, and other assessment instruments. In addition, counselors are expected to be able to maintain and communicate pupil appraisal data objectively and accurately. The exercises included in this cluster will enable you to document the required skills in pupil appraisal, and the Self-Assessment will help you record your progress in these endeavors.

Objective: Upon completion of instructional activities in this cluster, you will have prepared (A) a list of (1) achievement, (2) aptitude, (3) intelligence, and (4) interest tests available to the counselor; (B) a list of nontest devices to conduct student appraisal, which may include (1) observation guides, (2) interview guides, (3) student autobiographies, (4) self report scales, etc.; and (C) a list of sources of student appraisal within and outside the school system.

EXERCISES

Directions: Below are several instructional activities designed to enable you to meet the objectives stated above. Remember that while all exercises are optional, primary exercises are required for certification.

Primary Exercises

1. Prepare a list of tests using the four categories identified in (A) under "Objective" as stated above, which are both appropriate for your client population and which you are trained/qualified to administer. Possible steps

in completing this activity include the following:

(a) Check with your guidance supervisor, principal, and/or State Director of Guidance to find out which tests are required in your school and when they must be scheduled. Write and distribute to students, parents and staff the standardized testing schedule available for students at your school.

(b) Write for specimen sets, including manuals, for all tests used in your setting, and place each set in a separate folder in your professional file. For those tests that are secure, such as the ACT or SAT, place descriptive material in a similar file folder. See Anatasi (1976), Cronbach (1970) or Goldman (1971) for a list of test publishers.

(c) If possible, take each test yourself in order to become more familiar with the directions, results, and interpretation of the test.

(d) Read pp. 708-721 Psychological Testing (4th edition) by Anastasi; or Essentials of Psychological Testing by Cronbach; or pp. 209-244 in Fundamentals of Guidance (3rd edition) by Shertzer and Stone; or pp. 91-96 in Using Tests in Counseling by Goldman; or pp. 52-69 in

Facilitating Career Development by Reardon and Burck.

Exercise 2. Prepare a list of nontest devices identified in (B) under "Objective" as stated above, which are appropriate for your client population. Possible steps in completing this activity include the following:

(a) Read reference materials on nontest techniques of appraisal in the five basic texts identified in 1 (d) above. These references offer excellent lists and brief descriptions of non-standardized sources of pupil appraisal available to counselors. This review will take several hours, so be prepared to spend some time reviewing these resource materials.

(b) Write or prepare specimen sets for all nontest materials appropriate for use with your clients. As with tests, file each instrument in a separate folder.

(c) Try out some of the nontest devices on a limited basis. If they seem to work and generate useful data about the students, record that information and include it in the folder. Comments by teachers or paraprofessionals who use these materials should also be recorded.

Exercise 3. Accurately report and record all student appraisal data in either the cumulative record file or the student counseling file, depending on which one is appropriate to school policy. It is absolutely essential that student test results be properly recorded, and you need to be able to explain in detail exactly what steps you and personnel under your supervision take to accomplish this task.

Exercise 4. Prepare a list of sources of student appraisal both within and outside the school system. This list must include these three categories: (1) medical, (2) psychological and (3) academic. In preparing this list, the following ideas may be helpful to you:

(a) Review the cards in your Referral File to see which agencies or services would offer appraisal or evaluative assistance with your clients.

(b) Ask the school psychologist or principal to review the first draft of your list of appraisal sources.

(c) Ask a staff member of the local medical society, health unit, and/or mental health center to review your tentative list.

SELF-ASSESSMENT

In order to help you assess your readiness to move on to the next cluster of activities related to Resource Management Skills, record the date for each item on the Self-Check Chart below:

Activity	Date Completed
1. Prepared list of tests.	1.
2. Prepared a testing schedule for students at your school.	2.
3. Prepared a test file of specimen sets and sample tests/nontests.	3.
4. Prepared a list of nontest devices.	4.
5. Prepared to describe and explain the way appraisal results are recorded in student files.	5.
6. Prepared a list of sources of student appraisal.	6.

If you have recorded a date for items "1" through "6" above, you are ready to move to the next cluster.

RESOURCE MANAGEMENT SKILLS

The effective management of information resources has recently become more important for school counselors. For example, the career education movement has focused on the increased use of community resources in career exploration for school students. Clusters in this section include such diverse topics as identifying materials and people for occupational exploration; listing educational or extracurricular training opportunities; preparing drug, multiethnic, family planning and interpersonal relations materials; developing a confidential medical file; and creating a parent information package. In addition to the ten product indicators, there are also five process indicators included in resource management skills. These fifteen skills indicators are grouped into seven interrelated skills clusters.

Cluster V: List of Occupational Exploration Materials

This cluster includes one goal, which is a required product indicator. Consequently, the Exercises described below will lead to the production of a written product for your Information File. It is important to underscore

the fact that preparing a list of occupational exploration materials is presently a priority function because of student need for vocational planning and growth. The Self-Assessment page will help you keep a record of your work on this Cluster.

> Objective: Upon completion of learning activities in this cluster, you will have prepared a list of occupational exploration materials available to students and teachers.

EXERCISES

Directions: Below are several activities designed to enable you to meet the objective stated above. All of the activities are optional, but the Primary Exercises are required for certification.

Primary Exercises

Exercise 1. Using either file cards or a notebook, begin preparing a list of occupational exploration materials currently available in the guidance office, career center, or library. This inventory should include an assessment of the quality of the material on the following factors: (1) publication date, (2) appropriateness for teacher

and/or student use at given grade levels, (3) occupations available in local area, (4) accuracy or currency of information, (5) presence or absence of sex bias, and (6) accessibility to students and teachers. Existing materials not acceptable on all these factors should not be included on your list.

As an illustration of how these criteria might be applied, here are some specific examples of poor quality material. If the material is (1) more than three years old, (2) written at a reading level above or below the grade level of the student who will use it, (3) does not describe occupations available locally, (4) does not reflect current or revised labor market reports, (5) does not show minorities or women in nonstereotypic occupations then it should not be included on your list.

Alternative Exercises

Exercise 2. Consult with your supervisors, perhaps the guidance director and/or principal, the advisory committee, or others regarding the following issues: (1) how to keep resources files current, (2) how to make resources available to users, and (3) how to update files regularly. Your discussions with these people should include who, when, and how these issues or tasks might be handled in

your situation. Draft a written set of procedures summarizing consensus responses to these issues, and distribute these procedures to all school professional staff.

Exercise 3. Based on your inventory of the existing occupational information materials, your assessment of the quality of present and future programming in this area, and your review of professional literature available on the topic, prepare a list of occupational exploration materials available to students and teachers.

Exercise 4. Given that a good career information center can be established on a budget of $1000 annually for materials, consult with your supervisor to determine what budget constraints apply in your case as you seek to prepare a list of desired occupational materials.

Exercise 5. Review the excellent resource material available in two of the following texts. Each of these books provide lists of various kinds of commercially produced materials.

Hoppock, Robert. Occupational Information (4th edition). New York: McGraw-Hill, 1976.

Isaacson, Lee. Career Information in Counseling and Teaching. (3rd edition). Boston: Allyn & Bacon, 1977.

Minor, Carole. Developing a career resource center. In Reardon, R. and H. Burck (Eds.), Facilitating Career Development: Strategies for Counselors. Springfield, Ill.: Charles Thomas 1975.

Norris, W., F. Zeran, R. Hatch, & J. Engelkes. The Information Service in Guidance: For Career Development & Planning. (3rd edition). Chicago: Rank McNally, 1972.

Tolbert, E.L. Counseling for Career Development. Boston: Houghton Mifflin, 1974.

Cluster VI: Survey of Local Job Market

This cluster includes one product indicator which involves a survey of local community employment resources or jobs. This task is extensive and complex, and the Exercises described below will help you organize your work so that you can document your skills. The Self-Assessment (page 48) will help you organize your work in this cluster.

> Objective: Upon completion of learning activities in this cluster, you will have prepared a survey of the local job market that (a) is current--no more than 18 months old and (b) includes job titles and number available, training requirements, contact person with address and phone.

Directions: Below are several instructional activities designed to enable you to meet the objective stated above.

Primary Exercises

The following exercise is required for those working in larger communities:

Exercise 1. Since you work in a metropolitan area, it would be extremely difficult for you to conduct a local job labor market survey. However, you can use secondary resources to conduct a survey of local community employment resources. After listening to the audiotape or reading the script, "Conducting a Local Community Job Survey," (Appendix E, page 106) prepare a set of index cards containing the following information: (1) Name of employing organization or employment service agency, (2) address, (3) phone, (4) contact person and title, (5) client services or kinds of job available, and (6) referral procedures.

The following exercise is required for those working in small towns or rural areas:

Exercise 2. Conduct a survey of the local job market following the directions in either of the following

resoure books (or other resource materials). (Appendix C, page 95).

Norris, N., F. Zeran, R. Hatch, & J. Engelkes. The Information Service in Guidance (3rd edition). Chicago: Rand McNally, 1972. (pp.299-327)

Tolbert, E.L. Counseling for Career Development. Boston: Houghton-Mifflin, 1974. (pp.144-147)

It should be noted that while the benefits to the school from a well designed and executed occupational survey are very great, such a survey also requires a major commitment of resources--time, staff, and money.

Alternative Exercises

Exercise 3. Listen to or read the script of the mini-lecture,"Local Community Job Survey," prepared by the author. (Appendix E, page 106)

Cluster VII: List of Community Resource People for Career Exploration

This cluster includes one product skill indicator, and completion of the Exercises will enable you both to document your skills and produce another piece of material for your Information File. The utilization of community resources in career exploration is an important counselor function for several reasons. First, many students can benefit most from first hand contact, rather than reading

occupational briefs, second, the creative use of community resources builds support for the career guidance program. Therefore, this cluster represents an important area of the counselor's role in information processing. When you complete the learning exercises described below, you will have created a card file of names of resource people and the kinds of career exploration experiences each can provide. The Self-Assessment will help you monitor your skill development in this important area.

> Objective: Upon completion of learning activities in this module, you will have prepared a list of community persons available for career exploration programs, including names, career titles, and contact information.

EXERCISES

Directions: Below are several Learning Activities designed to enable you to meet the objective stated above. You should complete all of them in order.

Primary Exercises

Exercise 1. Prepare 100 blank cards according to the following format:

Occupation:	DOT Number:
Contact Person:	Date of Entry:
Title:	Key Entry Number(s):
Address/Phone:	
Comments:	

Exercise 2. Consult with other counselors and school personnel to see if a list of career resource people has already been compiled. For example, the principal, vocational teacher, or career education director may have already identified career related referral resources which they will share with you.

Exercise 3. Prepare a key card as shown on the following page, which can be inserted in the beginning of the file and elsewhere.

Directions: Each numbered item below describes the type of career exploration that a community resource person can provide. A Key Entry number or numbers, 1 through 7, appears on the name card of each resource person, which identifies the type(s) of service that person can provide.

1. Will submit informational materials about occupation, e.g. booklets, audiotape, etc.
2. Will provide for on-site use of informational materials.
3. Will speak about occupation to a group.
4. Will discuss occupation with a student.
5. Will allow an individual student to visit and observe on-the-job (shadow).
6. Will allow small group (less than 10) to visit.
7. Will provide non-paid on-the-job experience.

Exercise 4. Compile a list of prospective people to serve as resources after checking the local chamber of commerce directory, officers of community service organizations, classroom teachers or school administrators, and school volunteers.

Exercise 5. Send a letter to each prospect which describes the purpose of the community career resource directory, how names will be used, a check-off for each of the 7 types of activities noted in Exercise 3, a place to list names and occupational titles of other prospective resource persons, and a signature spot for indicating willingness (or not) to participate in the program. (See sample letter on the following page.)

EXAMPLE

Dear_____ ,

This letter pertains to your participation in our Community Resource Directory for students at_____. The Resource Directory is composed of names of individuals to whom students can be referred for information about a particular occupation. This provides students with the opportunity to interview, observe, and consult with people already employed in various occupations. Please fill out and return this letter to us promptly.

The following are ways you might assist students in career decision-making:

___1. Submitting information materials about my occupation, e.g., booklets, audio-tapes, etc.
___2. Providing for on-site use of information materials.
___3. Speaking about my occupation to a group of students.
___4. Allowing a student to discuss my occupation with me, e.g., reasons for entering the field, relevance of academic preparation, advantages-disadvantages of the job, special opportunities, etc.
___5. Allowing an individual student to visit and observe on the job.
___6. Allowing a small group of students (less than 10) to visit and observe on the job for a special length of time.
___7. Providing non-pain on-the-job learning experience.

I am interested in providing the above types of assistance to students.
___ yes ___no If you checked no, please note any changes in the type of assistance you are willing to offer students._____
_____
_____

Letter continued next page

I am located at the address which appears on the first page. ___yes ___no
If no, please provide your correct address below:

_____

_____

_____

My current phone number is_____.

I suggest that you contact the people below to determine if they are interested in providing assistance to students. (List here any persons you feel may wish to participate in the Community Resource Directory. If possible list their addresses also.)

_____

_____

_____

_____

Signed_____

Although we are updating the Directory on a yearly basis, an individual may withdraw his or her name from it at any time. The Directory will be distributed only to those individuals with career advisement responsibilities so that the number of students referred to anyone listed can be controlled.

Thank you for your cooperation. If you have any questions, do not hesitate to contact us.

Sincerely,

Coordinator of Community
Resource Directory

PLEASE RETURN THIS LETTER TO:

Exercise 6. Transfer information obtained from the mailed survey described in Exercise 5 to the blank cards identified in Exercise 1. You will then have created a card system for local persons available for different kinds of career exploration programs.

Exercise 7. The names in the card system resource list should be used as an aid by the counselors and teachers in the school who work with students likely to benefit from career exploration. The names should not be made directly available to students and proper referral procedures should be used by the counselor.

Cluster VIII: List of Educational Opportunities at Post-secondary Level For High School Students and Extra Curricular Opportunities For Elementary and Junior High Students.

This cluster focuses on the need for high school and elementary/junior high students for information about future training for extracurricular opportunities. Historically, this activity has been one of the most important counselor functions. This cluster includes one product skill indicator, and completion of the

appropriate set of exercises (depending on your school population) will enable you to document your skills in this area of information processing. The Self-Assessment (p. 48) will help you keep a record of your work.

> Objective: Upon completion of instructional activities in this cluster you will have prepared either (1) a list of post-secondary educational opportunities materials or (2) a list of extracurricular educational opportunities, depending on your work setting.

EXERCISES

Primary Exercises

The following exercises are suggested for counselors working on the secondary level:

Exercise 1. Using the national or state directory of community colleges, develop a list of schools in your area and write for a catalog and other descriptive information about the school.

Exercise 2. Using the national or state directory of four year colleges or universities, compile a list of the state or major private schools in your area and write for a catalog and other descriptive information about the school.

Exercise 3. Using the state or national directory of vocational schools, compile a list of all vocational/technical schools in your area and write for a catalog and other descriptive information.

Exercise 4. Using the chamber of commerce directory, a directory of proprietary schools, or a directory of major area business firms, compile a list of area business/industry organizations and write for descriptive information on job training programs.

Exercise 5. Using the telephone directory, get toll free numbers of the recruiting or training section of each branch of the military (listed under U.S. Government) and call or write for materials describing the various educational and technical training opportunities available in the military.

Exercise 6. From each of the five postsecondary training sites identified above, secure information on applications for financial aid.

Exercise 7. In consultation with your supervisors, develop a plan for keeping resource files current, making resource materials accessible to users, and updating annually, educational information materials. Some

materials might be placed on bookshelves with others, placed in file folders, stored in a file cabinet or open bin.

Primary Exercise

The following exercise is suggested for counselors working at the elementary level:

Exercise 1. Using a community directory, the referral file you have created, the telephone directory or other materials, develop a list of the following groups which include (1) program name, (2) contact person, (3) entry requirements, and (4) costs:

1. Local recreation programs.
2. Scouting groups.
3. Community sponsored programs, e.g. YMCA Boys Club, community service organization projects, etc.
4. Programs for exceptional students.

SELF-ASSESSMENT

In order to help you assess your readiness to move on to the next cluster of activities related to Resource Management Skills, record the date for each item on the self-check chart.

Activity	Date Completed
1. Prepared a list of occupational exploration materials.	1.
2. Conducted a survey of the local job market or employment resource information and prepared a report.	2.
3. Prepared a list of community career resource people.	3.
4. Prepared a list of post-secondary educational opportunities, or extra curricular educational opportunities.	4.

When you have entered a date for each of the activities shown above, you may proceed to the next cluster.

Cluster IX: Information Resource Materials Drug Use, Family Planning, Multi-ethnic Groups, and Interpersonal Relations.

This cluster includes four different product indicators all of which involve the management of personal/social information resources. The exercises will lead

to the production of four different sets of materials for your Information File. Taken together, these materials will provide some excellent ways to verify your skills in information processing. The Self-Assessment will help you record your progress in Cluster IX.

> Objective: Upon completion of learning activities in this cluster, you will have prepared objective information materials suitable for the population served on (1) drug use, (2) family planning, (3) multi-ethnic education, and (4) interpersonal relations.

EXERCISES

Directions: Below are several instructional activities designed to enable you to meet the objective stated above. All of the activities are optional, but the primary exercise is required for certification.

Alternative Exercises

Exercise 1. Write to Publications, American Personnel & Guidance Association, 1607 New Hampshire Avenue, NW, Washington, D.C. 20009, and request a catalog. APGA

publishes a wide variety of excellent materials related to the objective of this Cluster.

Exercise 2. Call specialists on your referral source list (See Cluster I) and ask for materials related to the four areas identified in the above objective.

Exercise 3. Read useful information in Part IV "Personal-Social Information for the Individual" (Chapter 14-17) of Hollis and Hollis, Personalizing Information Processes, New York: Macmillan, 1969. This reading presents some excellent suggestions to the counselor on the preparation and use of information materials related to the objective above.

Exercise 4. Consult with leaders of multiethnic organizations, multiethnic teachers, and other resource persons on suitable educational materials on all general ethnic groups (Asian, Afro-American, White, Native American, Hispanic, etc.).

Exercise 5. Purchase a copy of Values Clarification, Sid Simon, et al. (New York: Hart, 1972, A Handbook of Structured Experiences for Human Relations Training, by Pfeiffer & Jones (LaJolla, CA: Univ. Assoc., 1974), or some other inexpensive printed materials which describe

interpersonal growth experiences suitable for classroom use.

Primary Exercise

Exercise 6. Given completion of activities "1" through "5" above, and/or any additional sources of drug use, family planning, multiethnic, and interpersonal relations materials, prepare one file folder of materials which are objective and suitable for the population served. Ask two colleagues to review the collected materials to verify that they meet specified criteria.

SELF-ASSESSMENT

Activity	Date Completed
1. Prepared drug use information that is objective and appropriate for students served.	1.
2. Prepared family planning information that is objective and suitable for population served.	2.
3. Prepared multiethnic education materials that are objective and include all general ethnic groups.	3.

Activity	Date Completed
4. Prepared interpersonal relations materials including classroom activities and student materials.	4.

When you have entered a date for all of the activities listed above, you will be ready to move to the next part of this module.

Cluster X: Confidential Emergency Medical File

Cluster X involves one product indicator which is concerned with the creation of a student confidential emergency medical file. The exercises described below will provide instructions on creating this file to be included in your Information File. Remember that the policy and procedures related to this file must be consistent with statements drafted in Cluster II. The Self-Assessment will help you record your progress in this cluster.

Objective: Upon completion of learning activities in this cluster, you will have prepared a confidential emergency medical file of students including (a) medical condition and (b) emergency procedures.

Directions: Below are several instructional activities designed to enable you to meet the objective as stated.

Primary Exercises

Exercise 1. Prepare 100 blank index cards with the following format:

CONFIDENTIAL EMERGENCY MEDICAL FILE

Name:_____

Address:_____ Phone:_____ Home/Work

Parents Names:_____ Phone_____ Home/Work

_____ Phone_____

Medical Condition:_____

_____

_____

Emergency Procedures:_____

_____

_____

Physician Name:_____ Phone:_____

Date Entered:_____

Exercise 2. Review school admissions/application data, consult with classroom teachers and school administrators, and make presentations to parent/student groups in order to identify students who should have their names included in the Emergency Medical File. Make sure that procedures for use of this file, i.e. which professional staff members have access to it, are consistent with statements in your Referral Policy and criteria. (See Cluster II)

Exercise 3. Have parents complete the Confidential Emergency Medical File card (See 1.), arrange cards in alphabetical order, and secure in your office.

Exercise 4. Update information in the Confidential Emergency Medical File regularly--ideally once each semester, but no less than annually.

SELF-ASSESSMENT

Activity	Date Completed
1. Prepared a Confidential Emergency Medical File (name omitted) showing (a) medical condition and (b) emergency procedures.	1.
2. Be prepared to show that the file is or can be updated regularly.	2.

Congratulations! When you have entered dates for the two activities above, you are ready to move ahead to the last cluster of this module.

Cluster XI: Parent Information Package

This cluster includes both process and product indicators, and the information package you prepare will be included in your Information File. The parent information package, of critical importance at school opening and in orienting new families to the school, is a good example of the information processing skills basic to this Module. Cluster XI provides an excellent, practical opportunity for you to demonstrate your skills in

this important area of the counselor-function.

> Objective: Upon completion of learning activities in this cluster, you will have prepared a parent information package including (a) school hours, (b) holidays, (c) lunch, (d) visitation policy, (e) emergency procedures, and (f) special services.

EXERCISES

Directions: Below are several instructional activities designed to enable you to meet the objective stated above. All of the activities are optional, but the Primary Exercises are required for certification.

Alternative Exercise

Exercise 1. Consult with past and present leaders of the school Parent-Teacher Organization, the school administration, and classroom teachers to determine what kinds of new or modified parent information materials are needed. This review should include topics in addition to those identified in the above objective; the most useful format, e.g. brochure, letter, etc.; time and frequency of publication; and distribution.

Primary Exercises

Exercise 2. Draft a copy of a parent information paper, including the topics identified in the objective.

Exercise 3. Show the draft to P.T.A. leaders, school administrators, and others before publishing the final document.

Exercise 4. Publicize the parent information package through the local media, group presentations, and program reports.

SELF-ASSESSMENT

In order to help you assess your progress through this module, write in the date for each item in the chart below.

Activity	Date Completed
1. Prepared a parent information package as indicated.	1.
2. Made presentations in local media or to groups on the topic.	2.

Well done! When you enter dates by the two activities above you will have almost completed this module.

The only remaining activity is the completion of the Post-Assessment.

POST-ASSESSMENT

Directions: Read each statement carefully, and then mark either Yes, No, or Unsure, depending on the relevance of the statement for you.

Y U N 1. Developed a system for informing staff, students, and parents about referral policies, procedures and programs.

Y U N 2. Described a system for consulting available resource persons and files prior to making a referral.

Y U N 3. Created a procedure for obtaining parental or student approval for referrals.

Y U N 4. Maintains contacts with agencies serving students and records all contacts.

Y U N 5. Maintains a record of students served by referral agencies and records contacts with those students.

Y U N 6. Maintains a current list of referrals to outside agencies.

Y U N 7. Visits referral agencies regularly.

Y U N 8. Observes and objectively records student behavior data.

Y U N 9. Maintains a test file and a testing schedule.

Y U N 10. Keeps student test files current and complete.

Y U N 11. Keeps resource files (career education, etc.) current for student and teacher use.

Y U N 12. Selects resource materials appropriate for grade levels served.

Y U N 13. Makes resource materials accessible to users.

Y U N 14. Keeps resource files current, e.g. most recent annual publication is available.

Y U N 15. Contributed to guidance publications and/or local media presentations.

Y U N 16. Prepared a referral file which lists medical, mental health, social, volunteer, religious, youth, government (and employment) services or agencies.

Y U N 17. Prepared written statement of referral policies and procedures, which outlines referral process for teachers, parents, and students; states policy on parental or student consent; defines procedures, forms used for referral; and describes follow-up procedures for students referred.

Y U N 18. Prepared a statement of referral criteria which includes guidelines for making a referral and guidelines for accepting referrals from other sources.

Y U N 19. Prepared a statement of symptoms and characteristics used to identify students with speech, hearing, visual, crippling and special health handicaps.

Y U N 20. Prepared a statement used to identify exceptionalities, e.g., creativity, intellectually gifted, withdrawn, socially maladjusted, aggressive, underachieving, slow learning, and retarded.

Y U N 21. Prepared a list of achievement, aptitude, intelligence and interest tests which you are trained/qualified to administer and which are appropriate for your clients.

Y U N 22. Prepared a list of non-test devices for pupil appraisal, e.g. observation guides, interview guides, self-rating scales, which are all appropriate for the client population served.

Y U N 23. Prepared a list of medical, psychological and academic appraisal services within and outside the school system.

Y U N 24. Prepared a list of occupational exploration materials that are both print and non-print media, adequately reflect occupations available locally, free from sex-role sterotyping, appropriate for teacher and student use, thorough, current, and accessible to teachers and students.

Y U N 25. Conducted a survey of the local job market that is current (no more than 18 months old) and includes job titles and number available, training requirements, and name and phone of contact person.

Y U N 26. Prepared a list of community persons available for career exploration programs that includes name, career title, and contact information.

Y U N 27. (High school level) Prepared a list of post-secondary educational opportunities, including catalogs from 2 and 4 year institutions in the state, information on all vocational institutions in the area, information on business sponsored and military training programs, and information on and applications for financial aid.

Y U N 27. (Elementary/junior high level) Prepared a list of extracurricular educational opportunities including local recreation programs, scouting groups, community sponsored programs, and programs for exceptional students.

Y U N 28. Prepared a list of drug use information that is objective and suitable for the population served.

Y U N 29. Prepared family planning or sex education information that is objective and suitable for the population served.

Y U N 30. Prepared multiethnic educational materials that are objective and include information on all general ethnic groups.

Y U N 31. Prepared interpersonal relations materials including classroom activities and student materials.

Y U N 32. Prepared a confidential emergency medical file of students which includes the medical condition and emergency procedures.

Y U N 33. Prepared a parent information package which includes information about school hours, holidays, lunch, visitation policy, emergency procedures, and special services.

INTERPRETATION OF POST-ASSESSMENT

If you answered no or unsure to any item in the Post-Assessment, return to the appropriate Learning Activities section and complete additional work and/or consult with your colleagues or supervisors for additional assistance.

APPENDIX A

THE BUCKLEY AMENDMENT

To: Chief Executive Officers and Representatives
Member Institutions

Subject: The Family Educational Rights and Privacy Act of 1974 (the Buckley Amendment)

As a special service to members of the College Entrance Examination Board and as part of its ongoing policy research on the impact of federal programs on students and institutions, the Board's Washington office has prepared the attached paper: The Buckley Amendment - Responsibilities of Educational Institutions.

The paper has three parts: (1) Those things an institution must do under the law and the final regulations, (2) those things it may do, and (3) those it must not do. The paper should be read in conjunction with the Department of Health, Education, and Welfare (DHEW) regulations issued June 8, 1976. If a copy is not available, it may be obtained for 75 cents from the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402. Ask for "Privacy and School Records," pp. 24661-75, Federal Register, Vol. 41, No. 118, June 17, 1976.

The draft of the paper was shared and discussed with DHEW officials. The final text reflects those discussions, but the College Board has sole responsibility for the paper's content.

The preamble to the regulations suggests that the DHEW wished to minimize the expense and distraction flowing from compliance with the Buckley amendment. So long as that attitude persists, an institution that applies common sense and good faith in safeguarding the interests of parents and students should be able to meet the requirements of the Family Educational Rights and Privacy Act of 1974 (FERPA).

The attached paper does not attempt to treat every detail of the Buckley amendment. If you have questions, they should be addressed to your own legal counsel or to the FERPA Office, DHEW, 330 Independence Avenue SW, Washington, D.C. 20201.

Lois D. Rice
Vice President

October 1976
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THE BUCKLEY AMENDMENT - RESPONSIBILITIES OF EDUCATIONAL INSTITUTIONS

The Family Educational Rights and Privacy Act of 1974 -- called the Buckley amendment in this paper -- provides for cutting off U.S. Office of Education (OE) funding to institutions that do not comply with the standards prescribed in this act.

The essence of those standards is that:

- Parents of a child who is under age 18 and has never attended an educational institution beyond the high school level must be allowed to look at that child's school records.
- Students on reaching age 18 or attending an institution beyond the high school level -- called eligible students in the regulations -- must be allowed to look at their own school or college records, and their parents no longer may do so.
- Schools and colleges may not release information about students or let anybody else look at their records -- with certain exceptions listed in the statute -- unless the parent or eligible student has given written consent.

To be effectively covered by the Buckley amendment, an institution must meet three tests.

1. It must be a place that students are attending or have attended.
2. It must keep records on those students.
3. It must be receiving funds under a program administered by the U.S. Commissioner of Education.

The regulations interpret the third test to include not just funds going directly to the institution, but those received by a student as well -- for example, a Basic Educational Opportunity Grant or a Guaranteed Student Loan made by a bank. If this interpretation is correct, a complainant's own grant or loan would be unusable at the school or college of attendance if the complaint resulted in a funds cutoff order.

If an institution is covered and does not wish to jeopardize its OE funding, it must do certain things mandated by the Buckley amendment and amplified in the regulations, may do certain other things, and must not do still other things.

An Institution Must Do These Things

1. Adopt a written policy statement covering the subjects detailed in Section 99.5 of the regulations.

In general, the statement must establish the various procedures by which the institution intends to comply with the act. But the statement must also contain a list of the types of student records kept, and of the titles and addresses (but not the names) of the officials responsible for keeping them.

It is not necessary to provide every parent or eligible student with a copy of the policy statement, but a copy must be "made available" to those who request it.

2. Give annual notice to parents or eligible students of their several rights under the act, as described in Section 99.6 of the regulations.

No particular form or manner of notice is mandated. The means chosen must be such as "are reasonably likely to inform.: Official examples: publication in a student handbook, catalog, or newspaper or by posting on a school bulletin board.

Former students or their parents need not be notified.

3. Allow parents or eligible students to "inspect and review" the school records maintained on their children/themselves.

In the case of students below the postsecondary level, there are no excepted records. However, certain materials are defined not to be "records" and thus are not subject to inspection: for example, the notes kept by a teacher are not shown to anyone else except a substitute. For details, see the definition of "education records" in Section 99.3 of the regulations.

In the case of postsecondary students, there are three exceptions.

a. Financial records and statements provided by parents "or any information contained therein."

b. Any confidential recommendation placed in the file before January 1, 1975 -- but the exception is lost if the recommendation is used for some purpose other than that for which it was furnished.

The regulations add a requirement that the author must have had a written assurance of confidentiality, or that there was a "documented understanding of confindentiality." The authority for this requirement is dubious.

c. Post-1974 confidential recommendations involving possible admission, employment, or honors -- but only if the student has signed a waiver of the right to inspect them.

The waiver is voided if the recommendations are used for a purpose other than that "specifically intended."

An applicant or student who has signed a waiver must, nevertheless, on request, be told the names of persons providing recommendations.

An applicant who never actually attends never gets the right, so far as the Buckley amendment is concerned, to inspect any record accumulated by any institution to which application was made.

A student in one unit of a university who applies for admission to another unit, but who never attends the other unit, has no right to inspect the records accumulated by the second unit.

Former students are entitled to inspect the records compiled on themselves, but not a record which relates only to their activities after leaving the institution. Parents of former students have similar inspection rights, as long as the former student is under 18 and has never been a postsecondary student.

4. Receive and consider a parent's or eligible student's request to amend the student's record and, if the request is denied, inform the requester of the right to a hearing.

Parents of former students may make such requests until the right passes to the former student, who thereafter evidently retains the right until death or until the records are destroyed, whichever occurs first.

While the point is not altogether clear in the statute or regulations, the right to seek amendment applies only to records that are also subject to parent or student inspection.

5. When a hearing is requested, provide it within a reasonable time, before any person who does not have a direct interest in the outcome, allowing the requester to be assisted or represented by any number of individuals of the requester's choice and at the requester's expense, and, within a reasonable time thereafter, provide the requester with a written decision, which must be based solely on the evidence presented at the hearing and which must include a summary of that evidence and the reasons for the decision.

Neither the statute nor the regulations require the institution to grant any appeal from the decision that follows the hearing, nor do they prescribe who for the institution must make that decision. It need not be the hearing officer.

The statute and the regulations are silent as to whether DHEW should or would entertain a complaint that a decision satisfying all procedural requirements was nevertheless in error on the merits, that is, that the record should have been amended. Probably DHEW will not do so.

6. If, after a hearing, the decision is to amend the record, the institution must do so accordingly and give written notice to the requester. There is no requirement for the requester's approval of the specific amendment.

If the decision is not to amend, the reqester must be allowed to place a written comment or explanation in the student's file, and it must be kept in the file as long as the file itself is kept. If the contested portion of the file is disclosed to anybody, the requester's statement must also be disclosed.

7. Decide -- and include in its institutional policy statement -- the criteria for determining who among the institution's own employees has a "legitimate educational interest" in looking at a student's record.

By definition, the administrative employees who maintain student records properly have access to them. Beyond that, the regulations leave entirely to the institution the decision as to what catagories of teachers or "other school officials" will have access.

8. Make a record, to be kept with a student's record, of every person who requests or obtains access to that student record -- except that no record need be kept for the institution's own employees who have authorized access.

Through a drafting mistake the regulations inadvertently enlarge the statutory requirement just stated. They purport to require a record of (a) every request (without exception) for "personally identifiable information" from a student record, and (b) of every actual disclosure of such information, except to a parent or eligible student, to a person named in a written consent given by a parent or student, or to the general public

if the disclosure is of directory information.

If the regulations were correct, an institution should keep a record, for example, of every reporter who asks the reason for the dismissal of a varsity athlete, and of every request for directory information. But the regulations are not correct, because the statute requires a record only of requests for access to records and of those people, apart from authorized employees, who obtain access.

In any event, the record must show the "legitimate interests" of the requester/obtainer. If there were none, presumably the record should so state.

9. When an institution makes an authorized disclosure of personally identifiable information from a student record, the disclosure must nevertheless be on condition that the disclosee not in turn release the information to a third party without the consent of the parent or the eligible student.

The regulations make clear that the officers, employees, and agents of a disclosee are not third parties.

The regulations also make clear that if the information may be furnished without the written consent of the parent or eligible student in the first place, the disclosee may pass it on to other recipients who could have obtained it in the first instance without parental or student consent. A notably murky provision of the regulations requires that in such cases the original institution -- or perhaps it is the disclosee -- must keep a record of the third parties who requested or obtained the information.

What the regulations do not make clear is the wording or manner by which the releasing institution is to impose the condition of nondisclosure to third parties. In any event, there is no duty to exact a promise of compliance from the disclosure or otherwise to enforce the condition.

An Institution May Do These Things

1. Give students more "rights" than are given to parents of students.

2. Charge a fee for copies of records made for parents or students -- but the fee must not "effectively prevent"

inspection of the record.

DHEW, in commenting on its own regulations, quotes them as providing for "reasonable" fees, but the text does not in fact include the quoted word. The "effectively prevent" proviso appears to be DHEW's roundabout way of saying that even a reasonable fee should be waived when the requester is both poor and distant from the institution.

3. Destroy student records. But this may not be done if there is an outstanding request from a parent, student, or former student to inspect the record proposed for destruction.

4. Release to anyone in the world "directory information" about a student. But before making such disclosures, the institution must give public notice to parents or students of what it classifies as "directory information," and of the right -- to be exercised within some prescribed time -- to prevent any directory-type disclosures about their children/themselves.

"Public notice" is not defined in the regulations. DHEW's own comments on the regulations give approval to such means as an article in the student newspaper or having copies available "at various department and school administrative offices." Clearly, actual notice to every parent or student is not required.

The regulations define "directory information" in the verbatim terms of the statute, except that "telephone listing" is changed to "telephone number" and the words "or other similar information" are added at the end of the list. For the full list, see Section 99.3 of the regulations.

In sum, an institution has wide latitude in deciding what to classify as "directory information"; and as long as the affected individuals have a fair chance to prevent disclosures about themselves, no one else is entitled to object.

There is no requirement that there be an actual directory or, if there is one, that only the information it contains may be released. The key is what kinds of information have been listed in the public notice.

An Institution Must Not Do These Things

1. Insist that a parent or student waive any "right"

provided by the Buckley amendment. It may request such a waiver, but not so urgently as to leave the impression that adverse consequences may flow from a refusal.

Strictly speaking, the Buckley amendment does not provide rights to individuals. Judicial precedent suggests that a parent or student could not successfully sue to enforce any of the amendment's provisions. The only enforcement procedure provided is through complaint to DHEW, and the only remedy is an OE funding cutoff -- that is, DHEW could not order access to a record. If the institution is not receiving OE funding, there is no remedy under the Buckley amendment. If it is, the remedy is likely to produce results.

2. Charge a search or retrieval fee in connection with student records.

The prohibition is not contained in the statute, and the regulatory authority for it is questionable. .

3. Disclose personally identifiable information from a student record, or disclose the record itself, to anybody in the world unless (1) the information is directory information, or (2) the parent or student has given written consent to the disclosure, or (3) the information or the record goes to one of the categories of persons or institutions listed in section 438(b) of the act and sections 99.30(a)(2) and 99.31 through 99.36 of the regulations.

The list of authorized recipients, and the precise conditions for disclosure to them, are not readily summarizable. Every institution should consult the regulations in preparing its basic policy statement and in devising its specific procedures for acting on requests for disclosure.

Two Final Comments

1. The Buckley amendment does not require any institution to release information to anyone, though its OE funding is at risk if qualifying parents and students are not allowed to inspect records. It authorizes, but in no way compels, the giving of information to various kinds of education and public officials, to accrediting organizations, etc. Some such recipients may have an enforceable right under some other law or contract, but they have none under the Buckley amendment.

2. After a student becomes 18 or enters a postsecondary institution, the parent must be denied access to the child's records, unless the child consents or is the parent's income tax dependent, in which cases the institution may -- but need not -- continue the parental access and furnish the parent with information about the student.

In determining which of its students are tax dependents, an institution may decide to include in its basic policy statement a presumption that all its students are dependent, or that none is, or that everybody under 22 is, and so forth. As long as the presumption is rebuttable by those who wish to make a point of it, such a course is consistent with the letter and spirit of the act and the regulations.

APPENDIX B

REGULATIONS AND PROCEDURES
SPECIAL EDUCATION PROGRAM

IV. PROGRAM AREAS

A. Mental Retardation

1. Definition

Mental retardation refers to significantly subaverage general intellectual functioning, existing concurrently with deficits in adaptive behavior and manifested during the developmental period. Significantly, subaverage refers to performance which is more than two standard deviations below the mean of the tests utilized.

2. Eligibility and Placement

a. Trainable Mentally Retarded

A trainable mentally retarded child will usually have an intellectual ability of approximately one third to one half that of the average child of a comparable chronological age. This child may be expected to benefit from a program designed to further his socio-economic usefulness in his home or sheltered environment or residential setting. The TMR individual has the potential for personal, social and emotional growth leading to productive living under supervision or within a sheltered environment.

For a child to be eligible for placement into a program for the trainable mentally retarded, his performance on the individually administered psychological examination shall lie more than three standard deviations below the mean on the tests utilized. Arbitrary restrictive criteria, including incontinence and immobility, shall not be required.

Additionally, a child should receive, within two months of placement, a medical examination. It is recommended that this be repeated biannually.

The determination to place any child into a special education program shall not be made exclusively or principally upon results of tests administered during evaluation. All pertinent data on each child should be reviewed by the entire committee. Cognitive and adaptive behavior criteria shall be considered.

b. Educable Mentally Retarded

The educable mentally retarded individual has the potential for personal, social and emotional growth leading to independent, productive living.

For a child to be eligible for placement into a program for the educable mentally retarded, his performance on the individually administered psychological examination shall range between two and three standard deviations below the mean of the tests utilized. Further, significant deficits in his adaptive behavior must be demonstrated.

The determination to place any child into a special education program shall not be made exclusively or principally upon results of tests administered during evaluation. All pertinent data on each child should be reviewed by the entire committee. Cognitive and adaptive behavior criteria shall be considered.

3. Enrollment

a. Trainable Mentally Retarded

The case load in instructional areas should not exceed 12.

b. Educable Mentally Retarded

The case load for the educable mentally retarded should not exceed the following:

Self-Contained

Primary	14	Junior High	18
Intermediate	16	Senior High	20

Resource and Modified Self-Contained 24

The time on supervised work-study sites for students enrolled in programs for secondary-age educable mentally retarded is counted as part of the instructional program. Students who have completed a prescribed program of in-school study may be placed on work-out experiences which constitute a maximum of a school day, provided the student attends a weekly or bi-weekly seminar conducted by his/her special education teacher or maintains daily attendance of one or more periods.

4. Facilities

a. Trainable Mentally Retarded

It is recommended that the school systems utilize a single system, regional or district center method of providing adequate services for the trainable mentally retarded, depending upon the number of children to be served. In some cases, total population to be served will not warrant the provision of a center offering a sequential program for school age children, and for this reason systems are encouraged to share services across system lines.

A center consists of a centrally located building housing a staff of several professionally trained teachers and paraprofessionals to serve the needs of children identified as trainable mentally retarded. Centers should be located in the larger populated areas of the districts and should provide all the

auxiliary services, including transportation, to train these children to become more useful citizens in their community. The center should provide areas for instruction in homemaking, self-care, motor coordination, language development, pre-vocational skills and academics.

b. Educable Mentally Retarded

In addition to facilities outlined in Section III.C., provisions should be made for use of vocationally oriented classroom facilities on the junior and senior high levels.

B. Behavior Disorders

1. Definition

When defined in terms of school functioning, a child would be said to be behavior disordered if his behavior is so inappropriate or destructive to himself or others that it interferes with receiving all or part of his education in the regular classroom situation. The child's primary difficulty is emotional/behavioral and cannot be explained satisfactorily by any other handicapping condition.

2. Eligibility and Placement

Based upon appropriate 1) screening, 2) diagnostic information which may need to include a psychological evaluation, and 3) staffing, one or more of the following factors exhibited by the student may be regarded as reasons for referral to or placement in behavior disorders program.

a. Displayed maladaptive reactions toward peers and authority figures.

b. Temporary or transitory disorders occasioned by crisis situations with the family.

c. Chronic acting out or withdrawal behaviors exhibited in the school setting.

d. History of school suspensions or expulsion.

e. Social maladjustment, as evidenced by adjudication through the courts, or other involvement with correctional agencies.

3. Enrollment

The following are recommended as maximum active case loads for behavior disorders.

Self-Contained	
Primary	8
Intermediate	10
Secondary	20
Resource	24
Itinerant	20

C. Specific Learning Disabilities

1. Definition

The term learning disability refers to one or more significant deficits in the essential learning processes involved in using spoken or written language. These may be manifested in disorders of listening, thinking, reading, writing, spelling or arithmetic. They do not include learning disabilities which are due primarily to visual, hearing or motor handicaps; to mental retardation, emotional disturbance or environmental disadvantages.

2. Eligibility and Placement

For a child to be eligible for placement into a program for specific learning disabilities,

a. There is evidence resulting from the individual psychological evaluation that the child's general cognitive abilities are average or near average.

b. Evidence must be exhibited of a significant disability in one or more of the following areas.

(1) Visual processing (perception, memory, association)

(2) Auditory processing (perception, memory, association)

(3) Language (receptive, expressive)

(4) Sensory integration

3. Enrollment

The following are recommended as maximum active case loads for a learning disabilities unit at any one time. Since students may move into or out of programs, however, the total number seen over an entire school year may possibly exceed these numbers.

Self-contained:	10
Resource:	24
Itinerant (two or more schools):	20

D. Visually Impaired

1. Definition

Children to be served include those whose visual handicaps prevent successful functioning in a regular school program; children whose visual handicaps may result from congenital defects, eye diseases, severe refractive errors, injuries to the eye or poor coordination. They fall into the following basic categories.

a. Functionally Blind

A child who will be unable to use print as his reading medium is considered to be functionally blind. Instruction in braille and in use of recorded materials will be essential to this child's education.

b. Legally Blind

A legally blind child is one whose visual acuity is 20/200 or less in the better eye after correction, or who has a limitation in the field of vision that subtends an angle of 20 degrees. He falls within the definition of blindness, although he may have some useful vision and may even read print.

c. Partially Sighted

A partially sighted child is one whose visual acuity falls within the range of 20/70 to 20/200 in the better eye after correction, or when the child cannot read 18 point print at any distance, on the basis of a current examination by an eye specialist.

Some children with a visual better than 20/70 will need specialized help. The local director shall determine whether the visual loss constitutes an educational handicap. Request for inclusion of such a child in a unit for visually impaired children should be made to the Special Education Program, Georgia Department of Education.

2. Procedures

a. A survey of the community should be made to determine the need for a program.

b. Vision screening, with special emphasis on early childhood screening, shall be provided for all children referred for

special services. A successful screening program requires the coordinated effort of the local education agency, ophthalmologists, optometrists, health department, social workers and interested trained volunteer agencies; i.e., PTAs, Lions Clubs, women's organizations, home economics trainees, etc. Training may be secured from the local and/or state health department and the Georgia Society for Prevention of Blindness.

c. Failures from screening shall be referred to ophthalmologists and/or optometrists for correction and/or follow up.

d. An eye examination report, completed and signed by the eye specialist examining the child, must be submitted for each visually handicapped child enrolled in the program.

3. Enrollment

a. Self-Contained

Preschool:	8
School-age:	12

b. Itinerant/Resource: 12

4. Facilities, Equipment, Materials

Appropriate housing shall be provided in a regular school building, as required by the type of program, with suitable furnishings and appropriate materials and equipment. Classroom size shall be determined on the basis of maximum number of children served and the type of activity at any given time.

a. Federal Quota Allocation

All children whose vision comes within the definition of blindness are registered by their school system through the Georgia Department of Education to

be included in the Federal Quota Allocation for legally blind children. A credit allocation, based on a per capita allotment for children under instruction on the first Monday in January, is set up on the books of the American Printing House for the Blind. It is against these credit allocations that the Georgia Department of Education authorized shipment of books and materials for the use of local schools in the education of visually impaired children.

b. Library for the Blind

All books and materials are circulated through the Library for the Blind, 1050 Murphy Ave., S. W., Atlanta, Georgia 30310. They are returned to this same address as soon as the school is through with them, for circulation to other visually impaired children.

c. Textbook Funds

Local textbook funds may be used for purchasing books and materials for visually impaired children.

d. Services

School personnel should register with all national agencies and organizations that provide materials and services to the visually handicapped. Lists of agencies may be obtained by writing the Consultant for Visually Handicapped, Special Education Program, Georgia Department of Education, Atlanta, Georgia 30334.

E. Hospital/Home Instruction

1. Definition

The child who has a medically diagnosed physical condition, which is non-communicable and restricts him to his home or a hospital for

a period of time which will significantly interfere with his education (a minimum of 10 school days), is eligible for the services of an itinerant hospital/homebound instructor.

2. Eligibility and Placement

   a. In order for an individual to receive hospital or home instruction, a licensed physician must declare that the child is physically able to profit from education instruction. Children with other handicapping conditions must meet the medical eligibility requirements.

      Teachers should maintain an average case load of eight. A minimum of 20 children should be seen per year.

   b. Students out of school because of a communicable disease, emotional problems, expulsion, suspension or uncomplicated cases of pregnancy are not eligible.

   c. Students are counted present each day if the student is seen a minimum of 3 hours per week.

   d. An adult shall be present in the home during the instructional period.

   e. The responsibility for children hospitalized in facilities where no educational program is available lies with the student's local education agency. The LEA should make appropriate arrangements with the system in which the facility is physically located.

3. Delivery Models

   a. Itinerant/Resource: Either at home or hospital

   b. Hospital:Placed full-time at hospital.

4. Facilities, Equipment and Materials.

Necessary instructional program information. equipment and supplies required for the education program for hospital/home instruction shall be provided specifically for use by the hospital/homebound instructional program. These materials may be provided from a central depository or from schools in which pupils are enrolled.

F. Speech Impaired

1. Definition

Speech and language services provide diagnostic (evaluative), therapeutic (habilitative) and consultative services for students handicapped by communication disorders. Communication disorders may be exhibited by one or more of the following: (1) a language disorder characterized in terms of comprehension and/or use of words and their meanings (semantics), grammatical patterns (syntax and morphology) and speech sounds (phonology); (2) a speech disorder characterized by difficulty in producing speech sounds (articulation), maintaining speech rhythm (stuttering) and controlling vocal production (voice) and (3) a speech or language disorder characterized by difficulty in receiving and understanding speech without auditory training, speechreading, speech and language remediation and/or a hearing aid.

2. Placement and Eligibility

Eligibility for speech and language services shall be determined on the basis of a comprehensive evaluation by a fully certified speech and language therapist. Placement of students shall be made in accordance with due process.

3. Continuum of Services

Local school systems shall develop and implement comprehensive speech and language programs, emphasizing a continuum of service

levels for all students in need of such services. Specific provision shall be made for the following.

a. Direct Service

This component is designed for students identified as having speech and language disorders. The behavior of concern will be modified in a program of intervention provided by the therapist. Only children receiving direct services are considered active case load. Case load will vary according to the nature and severity of the communication handicaps of students served by the therapist. Levels of severity must be related to the student's overall operative potential.

Severe

Student cannot be understood by and/or understand most persons without great difficulty; significantly prevents student from using verbal expression as a communication avenue.

Case load: 20 (minimum of 9 contact hours per school month per student)

Moderate

Student can be understood by and/or understand most persons but has difficulty using verbal expression for effective communication.

Case load: 45 (minimum of 5 contact hours per school month per child)

Mild

Student can be understood by and/or understand anyone but has some deviation from normal speech and language which calls attention to itself.

Case load: 75 (minimum of 2 ½ contact hours per school month per child)

b. Indirect Service

This component serves children identified as having communications deviations such as mild developmental articulation problems, language problems associated with cultural differences, functional voice deviations that are transitory in nature and mild hearing loss requiring minimal rehabilitation. The behavior of concern will be modified in a program of intervention by a person other than the therapist, with the therapist acting as consultant. Services may include in-service with school personnel and demonstration teaching in the classroom. A maximum of 10 hours per school month is recommended for indirect services.

c. Observation

This component is designed for children who are being considered for direct service. The behavior of concern is measured periodically by the therapist to determine if change has occurred without direct service.

d. Maintenance

Children eligible for this component will have previously received direct or indirect service. The behavior of concern will be periodically measured by the therapist to determine its stability.

Measurement is a component throughout all service levels. The therapist will record measurement data at regular intervals to be determined by the local system.

4. Delivery Models

While speech and language services will generally be provided on an itinerant or resource basis, provision shall be made for alternative delivery models as dictated by locally identified needs.

G. Physically and/or Multi-Handicapped

1. Definition

a. Physically Handicapped

These children whose body functions or members are so impaired, from any cause, that they cannot be adequately or safely educated in regular classes of the public schools on a full-time basis without the provision of special education services.

Physically handicapped may refer to conditions such as

(1) Muscular or neuromuscular handicaps which significantly limit the ability to move about, sit or manipulate the materials required for learning.

(2) Skeletal deformities or abnormalities which affect ambulation, posture and body use necessary in school work.

(3) Disabilities which result in reduced efficiency in school work because of temporary or chronic lack of strength, vitality or alertness.

b. Multi-Handicapped

Multi-handicapped may refer to children who have some physical or sensory handicap and one or more additional handicapping condition(s) which are educationally significant to the extent that they cannot respond to regular instructional techniques provided for students in other special education programs for the physically handicapped or mentally handicapped.

2. Eligibility and Placement

In addition to the information required in

the general section, for a child to be determined eligible for placement in these special programs, he must have

a. Current medical report from physician or physicians qualified to assess his physical problems, indicating a description of handicapping condition and any medical implications for instruction.

b. Annual medical examination to determine changes in the physical condition of the child and medical implications reflecting appropriateness of continued special education service for that condition.

c. Arbitrary restrictive criteria, including incontinence and immobility, shall not by applied.

3. Enrollment

Maximum case load is:

Self-Contained	10
Resource/Itinerant	6

The case load number for itinerant may vary according to geographic distances covered by and severity of handicaps of children served.

4. Facilities and Equipment

In addition to the requirements found in the section on general provisions, alterations to school plant facilities, such as the installation of ramps and handrails, are recommended. Architectural barriers that prevent the student from using the school facilities should be eliminated. One teacher aide per class is recommended.

H. Hearing Impaired

1. Definition

A hearing impaired child is one who exhibits a hearing loss which interferes with his acquisition or maintenance of auditory skills necessary for the development of speech and language.

This may include children who are hearing impaired due to congenital or acquired factors. The educational classification and class placement of hearing impaired children shall depend primarily on the child's communication ability which is determined in part by age of onset, severity of loss, educational abilities and presence of other handicaps.

2. Eligibility and Placement

Otological and audiological evaluations shall be provided with initial referral. In addition to the information required in the general provisions, hearing impaired students shall have audiometric evaluations under the supervision of a certified/licensed audiologist and medical evaluations by licensed medical doctors. These evaluations should be updated every two years or as otherwise indicated.

3. Enrollment

Maximums should be reduced as dictated by the individual needs of students. Itinerant may include parent/infant services as hearing impaired may be served as early as identified.

Self-Contained	8	Itinerant	12
Resource	12	Preschool	6

4. Facilities

In addition to the information contained under general provisions, any classroom for hearing impaired students should be in a location away from undue noise and interruption. Amplification equipment shall be provided as necessary. It is recommended that the room

be carpeted, draped or otherwise sound-treated and air conditioned.

I. Audiology

Audiology is a diagnostic/evaluative/support service which is available for all of the public school population. It is not one of the special education teacher/clinician categories for a single exceptionality.

1. Role of the Audiologist

The role of the audiologist shall consist of audiological needs assessment and development and maintenance of means of meeting these needs. These may include

a. Providing for hearing conservation services, such as

(1) Screening (routine grade schedule, all newly entering students, previous failures, post-remarkable illness students, remedial classes, special education classes including students served by resource or itinerant teachers and teacher referrals).

(2) Screening prior to additional special services and evaluation shall include impedance audiometry and pure tone screening at 500, 1000, 2000, and 4000 Hz at 25 db level. This shall be done under the direct supervision of a certified and/or licensed audiologist. Direct supervision shall entail the development of a plan by a certified and/or licensed audiologist and approval by the local education agency.

(3) Follow-up evaluations and services (differential diagnostic and audiological evaluations, interpretations

and recommendations to teachers; referrals to other agencies and specialists and monitoring of progress).

b. Providing for habilitative and rehabilitative services (hearing aid orientation, evaluation of hearing aid functioning, evaluation of techniques of remediation and ongoing planning and maintenance of habilitative and rehabilitative services to students).

c. Providing for maintenance of appropriate records and utilization of data to evaluate and revise program procedures and techniques. Records shall be kept confidential and released to other agencies only with written permission from parent or legal guardian.

d. Providing consultative services (information to teachers and administrators, supervision or training of screeners, in-service training and demonstrations, parent counseling).

e. Developing and maintaining liaison with agencies and communities which will provide services complementary to the educational audiology services.

f. Participating as a member of placement committees consistent with procedures set forth in procedural due process.

2. Establishment of Staffing and Program Needs

a. Each local education agency, either through its own facilities or through its Cooperative Educational Service Agency (CESA), should provide audiological services. A ratio of one public school audiologist per 20,000 ADM is recommended.

b. The services shall be planned and maintained by individuals who hold current

Georgia Department of Eduction certifications in audiology and who are fulltime employees of the public schools.

c. These audiologists may utilize services of part-time or nonemployees of the public schools, provided those employees work under the direction and supervision of the public school audiologist and meet at least one of the following criteria.

(1) Hold current State of Georgia license in audiology.

(2) Hold all current appropriate professional technical and business licensure in Georgia and show evidence of being a current authorized representative or affiliate of each manufacturer whose products they service.

d. For the purposes of screening, trained volunteers may be utilized providing their work is supervised and interpreted by a certified public school audiologist.

e. At least minimum equipment should be provided and housed in an adequate size and design suite or mobile unit which has been sound-treated. A list of equipment and specifications for audiological services will be provided by the Special Education Program, Georgia Department of Education.

J. Intellectually Gifted

1. Definition

Students are intellectually gifted if their potential cognitive powers, when developed, qualify them to become high-level innovators, evaluators, problem-solvers, leaders or perpetuators in the complex society in which they live. Cognitive powers as used in this definition signify the complete range of

intellectual functions, sometimes referred to as intellect, intelligence or mental abilities. Included are psychological concepts such as thinking, abstract reasoning, problem-solving, creativity, verbal comprehension, numerical facility among others.

2. Eligibility and Placement

For a student to be eligible for placement in a special program he must have the potential to perform at a significantly higher level than the average student. Significantly higher level refers to performance which places a student at least 1 1/3 standard deviations above the mean of the mental ability tests administered. Placement must be decided by the local placement committee after careful review of a complete case study on the student, which includes data relative to student's cognitive abilities, special interest, psychological data, school achievement, emotional and social maturity, creative ability, and recommendation of teacher.

3. Delivery Models and Enrollment

In addition to the special class and resource room delivery models described in Section III.B of this document, gifted programs may be offered through the following special arrangements. These models should be coordinated by a certified teacher of the gifted.

For earning purposes for Section 5 units, the maximum case load for any model should not exceed 75.

a. Resource Room

See Section III.B for a definition of resource room program.

(1) The maximum case load for a resource teacher of the gifted is 60. At no time should the resource teacher work with more than 12-15 students in a resource room setting. The

case load for the itinerant resource teacher may be lower in order to allow for travel.

(2) Students should spend the equivalent of one full school day each week with the resource teacher.

b. Cluster Grouping

The teacher of a cluster should participate in a basic in-service education program in the area of the gifted. Desirably, this person should be fully certified in the area of the gifted.

c. Extended Day Program

Regular classroom teachers and volunteers should participate in in-service training programs in the area of the gifted.

d. Independent Study

Teacher-sponsors or advisors for independent study programs should participate in a pre-service workshop prior to beginning a program.

e. Advanced Placement Courses*

The regular classroom teacher who teaches advanced placement classes should participate in in-service programs in the area of the gifted.

f. Special Seminar

A small group of students with common interests and concerns meets regularly, short or long-term, for the purposes of study, discussion and exchange of ideas.

g. Joint Enrollment Program

(1) Students enrolled in such programs receive both high school and college

credit. Such students should meet State regulations for attendance in the secondary school in order that ADA credit may be claimed by the local education agency.

(2) Students may attend college full time and receive secondary school credit toward graduation for courses successfully completed. No ADA may be claimed by the local education agency for such students.

(3) Local education agencies and colleges or universities participating in joint enrollment programs should have agreements and policies that govern the operation of the program.

*Refers to program available through College Entrance Examination Board.

APPENDIX C

LOCAL COMMUNITY JOB SURVEY CARD

Local Community Job Survey Card

Date: _____

Organization: _____

Address: _____ Phone: _____

Contact Person: _____

Title: _____

Jobs Available: _____

_____

_____

_____

Application Procedures: _____

_____

_____

APPENDIX D

SCRIPT FOR "THE REFERRAL PROCESS"

THE REFERRAL PROCESS

The purpose of this minilecture is to provide you with some helpful background information on the referral process and to identify some practical steps in making effective referrals. Perhaps it is useful to begin with a definition, and Shertzer and Stone, in their book, Fundamentals of Guidance, provide such a definition. They stress that the point to be emphasized is that referral involves the transfer of an individual to the personnel or agency providing the different kind of assistance. The word "different" is the key one there, and is important to remember as you listen to this tape. Counselors operate in a constantly moving tide of referral relationships; they are constantly called upon by the clients and the people that they serve to provide a great variety of assistance in meeting human needs. Some beginning counselors do not realize that counselors cannot provide all the possible services to all the clients that they come in contact with; therefore, knowing how and when to refer people to sources of different assistance and help is an important part of the counselor's job.

This tape will focus on both counselor initiated referrals and on counselor accepted referrals. The ones

that we think about most frequently are those which counselors initiate because of the nature of the problem or concern that the client presents to them, but an extremely important part of a counselor's job is establishing arrangements with people within the local school setting regarding the acceptance of referrals (guidelines and principles which govern the referral process to the counselor). We will be looking first at counselor initiated referrals and make a variety of comments about principles and techniques of referrals, which I think will very clearly indicate how counselors would also use those same principles and techniques in establishing their own acceptance of referrals.

The referral process requires the utmost of professional skills and responsibilities; it requires judgments on the part of the counselor, and it requires a very careful assessment of personal and school resources. It is not just a technique; it is not just something that involves one, two, three steps; and, of course, it is not a signal of failure. It is not an indication that a counselor has not been able to measure up to some kind of professional responsibility. It is useful to read the American Personnel and Guidance Association Ethical Standards, for some information relative

to the ethics of referral might be helpful to the listener. Reading from the Ethical Standards we find: "If the counselor is unable to be of professional assistance to the counselee, the member avoids initiating the counseling relationship or the member terminates it. In either event, the member is obligated to refer the counselee to an appropriate specialist (it is incumbent upon the member to be knowledgeable about referral resources so that a satisfactory referral can be initiated). In the event the counselee declines the suggestion of referral then the member is not obligated to continue the relationship." It is clear from that statement that it is not a sign of weakness; it is really a sign of professional judgment and responsibility, when the counselor makes an appropriate referral.

As we have indicated, effective referrals do not just happen, there is a great deal of background work, e.g., the development of effective referral relationships, knowing about referral resources in the community. That is all part of background work. And there is also, as was indicated earlier, the attitude that the counselor brings to the referral task. Clearly, an attitude of assurance born out of confidence in what the counselor is doing is absolutely essential to effective referrals.

This action is contagious -- both a student and the parent will pick up on the reassurance the counselor is able to provide.

But the key part of the referral process that I want to discuss in the remainder of these remarks is the referral decision. The referral decision finally comes down to four steps which I would like to review here. The first part of the referral decision is the identification of the criteria for referral decisions. There are first some professional competency kinds of criteria, those involving the professional appraisal by the counselor of the client's condition; the strengths and the weaknesses; the nature of the problem which the counselee or the student is facing. That is an extremely important and delicate assessment which the counselor has to make. Second, the counselor must assess his or her own ability and resources to render the necessary services. That requires a very candid and honest self-appraisal. Next, the criteria for referral decisions include legal regulations which may guide the referral direction. It is important, for example, that clearance be obtained for any kind of report or the transmittal of client information. Parents must be brought in to the referral process, if the student is under 18 years of age. Appropriate

community agencies with legal responsibilities for providing different kinds of help and assistance should be consulted. Finally, there are personal factors that become involved in criteria for referral decisions. Even though counselors are reluctant to talk about this fact, it is sometimes impossible for the counselor to work with a given client for purely personal reasons. It is really a counselor strength if the personal basis for a referral is recognized and acted upon.

Besides the criteria for the referrals, there is the second part of the referral decision which involves personal knowledge of community resources. The chances are that the community has already conducted some kind of inventory of all the human services programs that are available in that community. If the community has not already done that, it will be necessary for the counselor to build a referral file. The local medical society, community action agencies, ministerial associations, volunteer groups, state agencies, employment services, medical and community services, yellow pages of the phone book, can all be resources that could be used in the development of the community resource referral files.

The third step of the referral decision is the referral itself. One important thing that must happen

when a referral takes place is that the client must participate, the client must have an active role in charting his or her future treatment, education, or whatever. In this sense, the referral can be therapeutic, because the client may come to achieve some new understanding of the nature of the problem or difficulties that he or she faces. So the referral itself is not something that is given to the client or simply told to them, but is something that the client actively helps develop. It is also extremely important for the client to know some very concrete facts about the referral. It's amazing how many times a client does not know the address of the agency to which he or she is being referred. Or they do not have the name and phone number of a contact person, or they lose track of their appointment time, or they do not know where to park when they go to the referral agency. Those kinds of bits and pieces can really make the difference -- all of the difference -- in the effectiveness of a referral. The clients should have specific instructions and should have information that can help them in locating and following through on the referral. It is extremely important in the case of elementary and high school students to have the parent actively involved in the process. The parent needs to know how

and why the referral is being considered and what kinds of outcomes will come from the referral.

The fourth part of the referral decision is the evaluation or follow-up. The evaluation of a referral is something that has to be initiated when the referral is first considered; the evaluation of the referral is really the joint responsibility of both the parties involved in the referral. If the referral is not a satisfactory one, then that information needs to be fed back to the counselor who initiated the referral, and additional arrangements will have to be worked out. The follow-up should include exactly what kinds of assistance will be provided to the clients, what kinds of reports will be provided back to the referring counselor, and the clarifying of who will take primary responsibilities for the client in the future.

The referral decision involves several steps. First, the criteria for the referral decision, including professional assessments, legal regulations, and personal factors; second, knowledge of community and human resources; third, the referral act itself; and, fourth, the follow-up or evaluation.

In concluding, it is useful to review the counselor's primary considerations in referrals, and these

can be identified as a series of questions: first, what information do I have about the needs of the student; second, how valid is the information; third, are there other staff members in my office or in our unit who may be able to provide additional information; fourth, based on all the available information about the student and his or her situation what remedial or preventive treatment is indicated; fifth, what sources of treatment are available; and sixth, how soon should the treatment begin. The answers to these questions require the highest form of professional judgment and responsibility of the counselor. Clearly it is important to note, finally, that referrals, because they involve relationships among agencies, must be cleared and conducted in proper administrative procedures. There are coordinating functions involved, and as we indicated before, there are legal kinds of ramifications. It is absolutely essential that a clear statement of referral guidelines, procedures and criteria be developed by the counseling agency -- both to help those referral resources to be used and also to help the clients, students, teachers, administrators and parents who counselors are themselves seeking to serve.

APPENDIX E

SCRIPT FOR "CONDUCTING A LOCAL COMMUNITY JOB SURVEY"

CONDUCTING A LOCAL COMMUNITY JOB SURVEY

Historically, counselors were very much involved in job placements and in helping the unemployed and the poor find work and develop meaningful lives for themselves in America. Counselors worked essentially in urban areas, particularly in the northeast, and Frank Parsons and many of the other people who contributed to the founding of the vocational guidance movement saw a major responsibility for counselors in helping people find work and productive employment.

Conducting a local community job survey assumes several things on the part of the counselor. First, it assumes that counselors do not have a negative attitude toward business and industry, that they are not suspicious of the profit motive, and that they do not prescribe to negative values associated with business. Second, it assumes that counselors can be very active -- that they know what is going on in the community; that they get out of their office; and that they have some resources to support them in those activities. Third, it also assumes that counselors can get beyond a counseling perspective; that they are concerned about what is happening in the broader community; and that counseling is not the totality of their professional role. Fourth, it assumes that

counselors do take a positive view of job placement -- that they have not set up some artificial limitations on their role concerning career planning, and job placement. Some authorities have tended to view counselors' avoidance of job placement as a kind of cop out on the counselor's part. Tolbert, one authority in this area, says that some people seem to feel that counselors have walked out on the hard part of the helping process.

If you think that you can meet the assumptions that are implicit in these four areas, then conducting a local community job survey should not be an impossible task. There are many benefits that can be derived from school-community cooperative effort. There are, of course, the student benefits in that the link between education and work becomes clearer for the students, the dropouts, and others who leave the institution. They do not end up sitting on the front door of the school without having anyplace to go. There are clearly school benefits from better school-community cooperative efforts. Public support for education is generally recognized as being at a low point, and as a school makes links with other segments of the community, there is an increased interest in what is going on in the school and an increased awareness of the relevance of education for other

community concerns. And of course, third, there are community benefits. A trained work force, students and adolescents who can find meaningful work in the local community are among the benefits to the community from increased cooperative efforts. A local community occupational survey is one way to bring clearly into focus a cooperative effort between the school and the community.

The purpose of this minilecture is to help you develop a strategy for conducting a community occupational survey especially if you live in a small town, or if you live in a metropolitan area or a larger town to identify services and agencies which perhaps have already done this. What we are suggesting here is a kind of distinction between primary and secondary resources for conducting a local community job survey. Primary sources would include actually conducting the survey yourself or directing one to be done. Secondary sources would assume that other agencies, for example, the State Employment Service, have already conducted local job surveys and that you can use those secondary sources in job placement activities for your students.

Most career resource centers have a variety of

state, regional, and national occupational information available, but it is important in a well rounded program to also have local employment information. The types of local occupational information ordinarily sought in a community occupational survey includes (1) an overview of the local occupational pattern at a particular time; (2) specific information about particular occupations; (3) indications of changes and trends in both occupational distribution and the occupations themselves. Local occupational surveys are used primarily in the schools as a way of helping provide students and parents with information about jobs, workers, present and future employment practices, and other related facts about the occupational life of the community.

The preliminary activities in conducting a community occupational survey involve a variety of clearances and approvals and planning strategies designed to secure broad based support for a survey. The board of education and the superintendent must be involved in approving plans for a community occupational survey and ideally a community advisory council made up of people from the local chanber of commerce, major business and industry groups, employment service representatives and others particularly knowledgeable and involved in the local job

situation will be able to help. While it is entirely appropriate for the counselor to assume major responsibilities in initiating and motivating others to conduct community occupational surveys, it is also important that the counselor not take total responsibility for this activity. One thing that a planning group would have to decide very early is exactly what the purposes of a local community job survey might be. For example, one purpose might be to describe current and potential manpower resources, or to provide a basis for job counseling, or to assist the community in cataloging and evaluating its economic resources, or to cooperate with other agencies and community groups in developing programs for economic development. Determining the exact purposes of a local community job survey will also influence the ways in which the results are handled. Counselors would, of course, have immediate access to the results, but other planning groups in the community might also need or want to have access to that information. In some cases communities have discovered that because jobs are not available locally, students are leaving and that the schools are training people to work in other areas within the state or the region. In some cases communities have also determined that corrections need to be made, that a

local community based education-work council needs to be established to develop more jobs within the local area. Finally, the results of a community job survey have sometimes indicated to schools that training programs are not relevant -- that the manpower needs in the local community are not being met and that the curriculum needs to be changed. It is important, to realize that the data obtained in a local community job survey can have powerful influence, perhaps political repercussions, within the school and in the larger community. Therefore, counselors should proceed carefully in conducting local community job surveys.

Perhaps, however, a counselor does not have the support, the time, the resources, or the interest to conduct a full-blown local community job survey, and in that case, a quick and hasty or a more limited informal effort can be very useful. At the very least, a local community job survey should poll primary resources, such as school personnel, professional staff of the state employment service, city and county government officers, chambers of commerce officials and representatives, personnel directors of major employing groups within the community, and these resources should be asked to provide the following basic information: (1) they should list

specific job titles available in their organizations; (2) they should furnish the number of positions available, monthly or annually; (3) they should identify the specific training requirements, or entry requirements for those positions; (4) they should provide the name, address and phone number, title of contact persons within those organizations who can provide current, up-to-date information about jobs within those organizations. A very simple one page survey form may provide all the space needed to conduct this kind of survey.

There are also other secondary resources, community employment resources, that a counselor can contact to develop information about employment within his or her community, and this may be especially appropriate in larger communities. For example, United States government agencies, such as the United States Civil Service Apprenticeship programs might provide useful information about jobs and job entry requirements. Such offices as the Labor Departments, Bureau of Apprenticeship and Training, or the State Apprenticeship Bureau can provide additional information.

Second, the Wage, Hour and Public Control Division within state government may be able to provide useful employment information, or the Federal Job Information

Center in the Civil Service Commission. The Youth Opportunity Center, and the Armed Forces (all the branches of the armed forces), may be among the federal governmental agencies that can provide useful information on local employment.

Third, state agencies such as the state employment service, manpower development and training groups, work incentive programs, Division of Vocational Rehabilitation, farm labor rural manpower groups, Human Resources Clearinghouse groups, Comprehensive Employment Training Act Administrators, and others may be among the state agencies that can provide useful information.

Fourth, there are local agencies within the community, such as the civil service board; the education, work, or employment committee of the chamber of commerce; there may be an organization such as the national allegiance for businessmen, or business/professional women's groups, that can provide useful employment information. Finally, there are a variety of other agencies and sources that can provide local employment information, and these would include private employment agencies. What kinds of services do these groups provide? Local union apprenticeship programs, or perhaps cooperative programs, in health, business, distributive education, work experience,

diversified cooperative training, and the like may be helpful. And finally, there are the old standbys like friends, relatives, and neighbors, telephone directories (particularly the yellow pages), newspaper want ads, teachers and other school personnel. It is very clear that in this last category there is a great deal of covert, hidden occupational job information that counselors, if they are alert and resourceful, can seek to develop. Newspaper ads about new business or industry groups that are planning to locate in the community can provide first hand information for follow-up and useful data about jobs.

Finally, it is extremely important to make sure that the data collected in a local community job survey is used, and that students and the people who need and want the information in the survey have ready and easy access to it. Copies of the report or the survey findings need to be made available to teachers, particularly in the vocational programs, school administrators, other members of the counseling staff, and others who can provide useful information and helpful assistance to students regarding jobs. Major findings of the report which may have implications for community development, curriculum change, or policies also need to be channeled back to

appropriate authorities. Bulletin boards, feature articles in the school newspaper, or even special articles in the local paper, parent reports at the parent/teacher organization meetings, units in courses within the school are also ways to make this information available and easily accessible to those who need it.

Last, of course, the decision would have to be made as to how and when the survey can be updated, when the information is out-of-date and no longer useful, to make sure that its accuracy is constantly maintained and updated.

Perhaps it would be useful to briefly summarize topics that have been included in this minilecture. First, it's important that counselors recognize the legitimacy of school -- community cooperative efforts, and understand that a local community job survey is one way in which links and bridges can be built between the schools and the community, particularly employers. Second, the results of a school-community survey of the local job situation can have important kinds of political ramifications and can effect policy in a variety of important dimensions of school-community life. Counselors should not proceed without carefully developed plans in conducting a local community job survey. Third,

informal surveys and assessments can be made -- sometimes the information needed has already been created by agencies such as the state employment service; but in other cases a brief informal questionnaire, perhaps even one conducted on the telephone, can develop useful job and employment information. Finally, that counselors must be sure that the results are used -- that they are not tucked away in some folder to become just dusty data which have no use or relevance to students who desperately need information about employment opportunities available to them.

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